T O U R I S M

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

OUTDOOR ADVENTURE VACATIONS

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

UNITED STATES MARKET MATCH SURVEY

OUTDOOR ADVENTURE VACATIONS

Prepared for:
B.C. Ministry of Development, Trade and Tourism
and
Industry, Science and Technology Canada

Prepared by:
Campbell Goodell Consultants

October 1991

92-02788/

ACKNOWLEDGEMENT

This study was funded through the Canada - British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost-shared equally by the government of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a federal/provincial Management Committee established for administration of the Agreement.

The Canada - British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November, 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada

Industrie, Sciences et Technologie Canada

British Columbia
Ministry of Development, Trade and Tourism

For additional copies of this publication and/or further information about the Canada - British Columbia Tourism Industry Development Subsidiary Agreement, contact:

Ministry of Development, Trade and Tourism
Research and Information Management
#300 - 1803 Douglas Street
Victoria, B.C.
V8T 5C3
Telephone: (604) 356-9932

or

Industry, Science and Technology Canada
P.O. Box 11610
900 - 650 West Georgia Street
Vancouver, B.C.
V6B 5H8
Telephone: (604) 666 - 0434

Canadian Cataloguing in Publication Data
Main entry under title:
United States market match survey. Outdoor adventure

"Funded through Canada-British Columbia Tourist Industry Development Subsidiary Agreement."
On cover: Economic & Regional Development Agreement, Canada, BC.
ISBN 0-7718-9075-3

1. Tourist trade - British Columbia. 2. Travelers - United States. I. British Columbia. Ministry of Development, Trade and Tourism. II. Campbell Goodell Consultants. III. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. IV. Canada/BC Economic & Regional Development Agreement.

G155.C3U53 1991 338.4'791711044 C91-092249-7

TABLE OF CONTENTS

Page

BACKGROUND 1

METHOD 2

PRODUCT DESCRIPTION

A. Size of Potential Market 3

B. Market Demographics 5

C. Cluster Analysis 8

D. Travel Experience and Interests 13

E. Specific Product Preferences 18

F. Media Factors 30

G. Marketing Implications 36

APPENDIX

QUESTIONNAIRE

BACKGROUND

The Ministry of Development, Trade and Tourism in British Columbia is concerned that the province remain competitive in the international tourism market. B.C. has resisted the decline in tourism most successfully during 1989 and 1990, while other Canadian provinces have suffered seriously. The task at hand now is to make B.C. more attractive to the potential international tourist, thereby ensuring that our industry will remain healthy in the years ahead.

This report forms part of the results derived from the 1991 U.S. Product Market Match Study, a project undertaken by Campbell Goodell Consultants to assess the market potential of current and future British Columbia tourism products in key United States centres and to provide a matching between these products and the characteristics of the market segments most interested in these products.

This is one of a series of four reports, each one devoted to one of the major vacation types investigated in the study. These were: the resort vacation, the city trip, the outdoor adventure and the touring vacation.

METHOD

The results reported below are based on a telephone survey conducted by Campbell Goodell Consultants Limited, in conjunction with Gilmore Research Group, in six American cities representing major sources of travellers to British Columbia. Interviews were conducted during the month of February, 1991 in Seattle, Portland, San Francisco, Los Angeles, Dallas and Chicago. A breakdown of the number of interviews per city is as follows:

Seattle	164
Portland	162
San Francisco	160
Los Angeles	160
Dallas	162
Chicago	161
	969

The survey was limited to those respondents, 25 years of age or older, who have travelled outside the United States during the past three years or who plan to do so in the next two years.

A second part of the study was provided by Compusearch Market and Social Research of Vancouver, using their Lifestyle Analysis procedure. This procedure assigns a lifestyle code to each of the respondents. There are 47 different groups in all (although only about six of these appear frequently among American visitors to British Columbia). Members of each group share common characteristics, including travel preferences.

PRODUCT DESCRIPTION

"An outdoor adventure" was defined for respondents in the survey as follows:

> "An outdoor adventure vacation in a natural area, where you could engage in activities such as camping, hunting, fishing, hiking or rafting."

A. SIZE OF POTENTIAL MARKET

Estimating the size of the potential market for B.C. outdoor vacations involves assessing respondents' likelihood of visiting B.C. for this particular type of vacation. In order to do this, rating information was collected using a scale from 1 (not at all interested) to 5 (extremely interested). A conservative approach applied to obtain market potential projections using the five (extremely interested) ratings only. A more optimistic approach would use both the four and five ratings. We will present both sets of information but will focus our projections on the five (extremely interested) ratings.

An outdoor adventure was selected as the holiday that 28% of our travellers were extremely interested in taking at some future date. It is to be expected that not all of these people, however, have British Columbia in mind. So the potential market has to be reduced accordingly. Of those extremely interested in an outdoor adventure, 54% also say they are extremely interested in a B.C. vacation, yielding a net of 15% of all travellers.

To estimate the numerical market potential for outdoor adventure vacations to B.C., we need to look at the overall percentage of travellers who have travelled outside the U.S., or plan to, and the total population of the area. These figures can be seen in Table I below.

Table I: Market Potential of U.S. International Travellers

	MARKET SIZE					
	Seattle - King Co.	Portland - Multomah Co.	San Fran Bay Area - S.F. Co.	Los Angeles - L.A. Co.	Dallas - Dallas Co.	Chicago - Cook Co.
1990 Population	1,000,702	371,779	3,934,685	5,518,676	1,176,450	4,968,305
Incidence of Internat. Travellers (25+)	28.7	14.4	30.9	15.3	14.7	17.2
Market Size	287,201	53,536	1,215,818	844,357	172,938	854,548

To determine the market share for outdoor adventures within B.C. we then apply the 15% of travellers who said they were extremely interested in outdoor adventure vacations to the market size for each city given in the previous table. The results of this are shown in Table II.

Table II: Potential U.S. Travellers to B.C. for Outdoor Adventure Vacations

Seattle Area	43,080
Portland Area	8,030
San Francisco Area	182,372
Los Angeles Area	126,654
Dallas Area	25,941
Chicago Area	128,182
Total	514,259

This approach to estimating suggests a total potential market of 514,000 U.S. travellers who would be extremely interested in taking outdoor adventure vacations to B.C. In terms of the number of people that make up the potential market, the San Francisco area and the Los Angeles area constitute the two largest groups. We need to consider, however, that these cities have a large number of travellers because they are densely populated areas.

The Chicago area is the third largest market with 128,000 potential travellers. This is followed by Seattle and Dallas. The smallest potential market is in the Portland area.

Note that these are estimates of the total number of travellers. Since they do not take into account the frequency of travel, they will be smaller than the total number of visits, especially for the more proximate cities.

B. MARKET DEMOGRAPHICS

The demographics of the travellers need to be examined in order to give us a better idea of who constitutes the potential market for outdoor adventure vacations. The demographics include who makes the major travel decisions in the households, age, gender and city of interview. This information was collected from all respondents who completed the survey.

Respondents who expressed interest in outdoor adventure were asked to indicate who made the major travel decisions in their households and the results are shown in Table III. In the table, 4 means the respondents were interested and 5 means they were extremely interested in outdoor adventure.

Table III: Major Travel Decisions in Household

Q64. Who makes the major travel decisions in your household?

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	967	176	271
Male Head of Household	28%	33%	32%
Female Head of Household	30	26	22
Both Together	41	40	45
Someone Else	1	1	1

Travellers who were extremely interested in an outdoor adventure were likely to come from households in which the male and the female heads of household made joint travel decisions, accounting for 45% of this category.

A third of this sample also stated that the male head was ultimately responsible for major travel decisions. In this respect, people extremely interested in outdoor adventure differed from the average traveller.

Unlike travellers who favoured city trips, a smaller percentage (22%) of travellers extremely interested in outdoor adventures had major travel decisions made by women.

Tables IV and V show the age and gender distribution of the respondents who were most interested in outdoor adventure vacations.

Table IV: Age Distribution of Respondents

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	969	176	271
Under 25	1%	0%	0%
25 to 34	33	40	40
35 to 44	28	24	31
45 to 54	17	19	15
55 to 64	10	13	6
65 and over	11	4	7

Table V: Gender Distribution of Respondents

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	969	176	271
Female	55%	45%	46%
Male	45	55	54

Interest in outdoor adventure was highest in the 25 to 34 age group, with 4 out of 10 travellers saying they were extremely interested in this type of vacation. This was followed closely by people in the 35 to 44 age group, with three out of ten travellers indicating they were extremely interested in outdoor adventure vacations. The level of interest displayed for this activity by these age groups was much higher than the average for other vacation options, indicating that there was a greater likelihood that these travellers would be willing to go on outdoor adventure vacations.

Two-thirds of the travellers who were most interested in outdoor adventure vacations were between the ages of 25 and 44. Apart from the under 25 age group, the smallest percentage of people who were extremely interested in outdoor adventure vacations were in the over 55 age group.

More males than females would opt for outdoor adventures, with males making up 54% of those claiming to be extremely interested in this vacation option.

Table VI shows the number of respondents from each of the six cities who were most interested in outdoor adventure vacations.

Table VI: City of Interview

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	969	176	271
Seattle	17%	17%	18%
Portland	17	14	21
San Francisco	16	24	13
Los Angeles	16	18	17
Dallas	17	16	13
Chicago	17	11	18

Travellers from Portland showed the largest percentage extremely interested in outdoor adventure, with 21%. It should be noted that this type of vacation had the greatest appeal in the smallest of the six metropolitan areas surveyed.

The second largest groups of extremely interested travellers came from Seattle and Chicago, at 18% each, followed closely by Los Angeles at 17%. An equal percentage (13%) of travellers from San Francisco and Dallas rated outdoor adventure as a five.

C. CLUSTER ANALYSIS

As a part of the interview, a street address and/or nine-digit postal code was collected from each respondent. This information was processed by Compusearch Market and Social Research. The result of this work was to identify each of the respondents in the survey with one of 47 possible geodemographic clusters.

The geodemographic clusters produced by the Compusearch analysis are based on aggregated data provided by the U.S. Census. Each small geographic area, roughly comparable to a Canadian postal code area, is characterized in terms of the average income, family composition, housing type and so forth. In fact, some 1600 indicators are used to characterize each area.

Once the area of residence of a respondent is known, he or she is assigned to the cluster into which this area of residence has been classified. This so-called "lifestyle cluster" allows the analyst to infer from the cluster identity a whole range of behaviours which the individual respondent is likely to share with other members of his or her cluster.

Of the forty-seven possible clusters, those respondents who have visited British Columbia or who plan a visit to the province tend to group into just six of them. These six represent over 45 percent of the total sample. Because these are the largest clusters and because they have a history of visiting British Columbia, they represent the most attractive targets for marketing and are treated in some detail in our analysis.

The following paragraphs give the basic descriptions of the six clusters which are the most important descriptors of international travellers living in the six sampled U.S. cities. The detailed demographics and product preferences of each of these groups can be found in the appendix.

Definitions of the Clusters

Affluent Urban Singles (Cluster 7)

Neighbourhoods in which members of this cluster live tend to be populated by upscale professionals. Often residents of high-priced urban and suburban apartments and condos, these high income singles lead an active lifestyle characterized by sporting activities, travel and an avid appetite for entertainment events of all kinds. Affluent Urban Singles tend to be aware of the newest trends and technologies, and indulge their taste for the new and different in areas as diverse as home entertainment systems and personal exercise equipment. Their purchase preferences lean toward high quality merchandise of all kinds, particularly home technology products. Financially, they tend to be greater risk-takers than some of their older cluster counterparts and concentrate more on investments with higher risk and bigger payoff.

This cluster represents 2.9 percent of the adult population of the United States and 13.5 percent of the present sample.

Young Professionals (Cluster 10)

Members of this cluster tend to live in neighbourhoods characterized by the presence of young, average income, single professionals. The members of this cluster share many characteristics with their more upscale High Rent Single Professional counterparts, including multi-unit dwellings and active lifestyles. Unlike the latter, however, Well-Educated Young Single Professionals tend to be younger and less asset rich. Extremely fitness and health conscious, their interests include sporting goods, gourmet and health foods and exercise equipment. While their income is still growing, these individuals indulge their taste for luxury with credit products including personal loans and credit cards. They are, however, beginning to accumulate assets in long-term deposit instruments and are likely, when able, to invest in brokerage accounts.

This cluster comprises 1.4 percent of the U.S. adult population and 6.5 percent of the sample.

Highly Mobile Working Couples (Cluster 12)

These above-average income, white collar workers are likely to live in two income families. Their primary focus is on their homes - expenditures on home furnishings and technologies are significantly higher than the national average. That is not to imply, however, that Young Mobile Working Couples with Children are homebodies. These young families are also active in a number of sports activities including golf, tennis, racquetball and skiing.

This cluster accounts for 3.8 percent of the U.S. adult population and 6.3 percent of the present sample.

Young Urban Educated Singles (Cluster 17)

Characterized as young, well educated and single, residents of these clusters lead the active single life. Although they may earn only average incomes, their education and professional experience combine to predict an upwardly mobile lifestyle. These individuals tend to reside in high rent apartments, and enjoy an upscale lifestyle. Well-Educated Young Mobile Single Apartment-Dwellers are avid participants in sports ranging from bicycling to racquetball, but their activities are not confined to the sports arena. They also enjoy live theatre, concerts, movies, and restaurant dining on a frequent basis. In addition, they appreciate the quality in articles as diverse as fashionable clothing and imported wines.

This cluster makes up 2.2 percent of the adult American population and 7.0 percent of the sample.

Young Urban Ethnics (Cluster 24)

An urban based cluster, this group contains households living in multi-family dwelling units, typically earning low incomes. Characterized by singles, Young Urban Ethnic Low Income Mobile Single households are likely to be headed by either females or members of various ethnic groups. The ethnic nature of this segment translates into a strong demand for gourmet and imported food items and beverages. This feature makes Young Urban Ethnic Low Income Mobile Single areas excellent target markets for products and services which have an ethnic appeal, as well as travel related services associated with their ethnic origins. In addition, these individuals are good markets for sporting activities, demonstrating a propensity for skiing, camping, jogging and attendance at professional sporting events.

Members of this cluster make up 2.6 percent of the U.S. adult population and 7.9 percent of the sample.

Young Mobile Apartment Dwellers (Cluster 25)

The urban areas in which members of this cluster live represent a younger, active segment - similar to Young Urban Ethnics without the ethnic flavour. Apartments, below average income and blue collar occupations typify these city-based households. Product preferences associated with this group include soft drinks, domestic beer and snack candy, as well as activities such as camping, skiing and fishing. Households living in Cluster 25 areas are also more likely than average to be headed by females.

In the U.S. adult population, 2.6 percent of adults belong to this cluster, as compared to 4.4 percent of the sample.

These cluster descriptions contain information that might have been anticipated. For example, we find that a large proportion of international travellers are young, often living in rented housing. Both characteristics correlate with high levels of mobility and, naturally enough, a high incidence of international travel.

Other patterns might not have been guessed. There is a high proportion of ethnics in the sample, especially Hispanics. This is doubtlessly due to the fact that many Hispanic residents of Los Angeles and Dallas travel to Mexico to visit relatives on a relatively regular basis. While level of interest in travel to Canada is relatively high, so is the level of disinterest, suggesting that this will probably be a difficult cluster to attract.

Finally, perhaps the most surprising characteristic of the six clusters described above is that they are not high income earners. Only two of the clusters are above average in income and only one can be described as "up-scale." One reason this occurs is of course because there are more middle income people in the population, even of the population of international travellers, than there are high income people. These data also suggest that people who visit British Columbia may be less affluent than those who travel to other international destinations.

We would be remiss not to point out, however, that in spite of their small numbers, members of the up-scale clusters in the sample do travel internationally with disproportionate frequency. The following lists the most affluent clusters, all of which are higher on the socio-economic scale than the top cluster described above. In addition, we provide the proportion each cluster comprises of the U.S. population and of the sample, as well as an index of over-representation (the quotient of the two previous figures).

Cluster	% of U.S.	% of Sample	Index
Top income, highly educated professionals in prestige homes	1.5	3.1	209
Well-educated mobile professionals in new homes and condos	1.2	1.8	148
Younger mobile professionals, home-owners with children	2.2	3.4	157
Mature Professionals with larger families (teenagers)	1.7	2.4	141
Non-mobile professionals in established communities	2.7	4.9	182
Younger mobile large families with children in new homes	3.1	3.2	104

We can see that all of these clusters are more likely than average to be international travellers. While they represent just over 12 percent of the adult population of the U.S., they comprise nearly 19 percent of international travellers in our sample. Some of this over-representation arises from the fact that our sample is restricted to urban areas where these clusters tend to live. Nevertheless, individuals in these groups should also receive marketing attention, particularly since they do not report much travel to British Columbia. This is especially true of any segment of the provincial tourism industry which is targeted toward up-scale travellers, such as wilderness resorts.

Importance for Outdoor Adventure Vacations

The clusters with the highest level of interest in outdoor adventure vacations are:

Cluster 7 (Affluent Urban Singles) of whom 31% expressed a preference for outdoor adventure vacations. More than half of this group comes from San Francisco/Los Angeles. The majority of this group have not visited B.C. and know very little about B.C. as a vacation designation. However, they indicate that they would be interested in visiting B.C. because it is beautiful and scenic.

Cluster 24 (Young Urban Ethnics) also had 31% interested in outdoor adventure. This group is also predominantly from San Francisco and Los Angeles, and they know the least about B.C. of any group and most have never been to the Province.

Cluster 10 (Young Professionals) had 29% express an interest in outdoor adventure. The largest portion of this group lives in Seattle/Portland, and is willing to spend less than other groups. B.C. scenery is an important factor in their travel decisions.

D. TRAVEL EXPERIENCE AND INTERESTS

An examination of respondents' travel experiences and their future plans would assist in determining the preferences of the travellers and the size of the potential market for B.C. The number of people who indicate an interest in travel to B.C. in the near future constitute the most significant part of the potential market.

In order to get an idea of the past history of these travellers, respondents were asked about their travel destinations in the last 3 years, which is shown in Table VII. We note, however, that many respondents gave more than one response for this question.

Table VII: Vacation Destinations of the Last 3 Years

Q3. Thinking of your major vacation travel to any of location, what vacation destination have you travelled to in the last three years?

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Total Number	969	176	271
Europe	33%	31%	30%
Mexico/Central/ South America	30	32	32
Other U.S. States	20	19	22
Other	19	18	18
California	14	15	13
Caribbean	13	12	10
Asia	12	14	11
Vancouver	**11**	**11**	**12**
Hawaii	11	11	10
Pacific Northwest	6	7	7
Australia/New Zealand/ South Pacific	6	8	6
Other Canada	6	5	4
Victoria	**5**	**6**	**6**
Ontario	4	3	5
Other B.C.	**4**	**6**	**6**
None	4	4	3
Alaska	3	1	2
Alberta	1	2	2

The major vacation destination that travellers in this category had travelled to in the last three years was Europe. Mexico, Central America and South America was a close second with other U.S. states coming in as the third most popular vacation destination. The place that had been least often selected for vacations was Alberta.

When looking at B.C. as a vacation destination, we see that 12% of the travellers who were extremely interested in an outdoor adventure had been to Vancouver in the last three years. Victoria came in fourteenth in the list of locations that were mentioned by these travellers, with 6% of those who were extremely interested in this vacation option having visited it recently. Other places in B.C. had been a destination for 4% of the travellers in the total sample and 6% of the travellers in the extremely interested category.

If we eliminate the multiple responses to get a percentage of travellers who mention a B.C. destination at least once, we have a net of 19% of those travellers interested in outdoor adventure. This percentage would constitute the market of existing travellers that could be attracted back into the province.

In the next table, we look at what destinations these respondents intend to visit in the next 2 years. We note that some travellers gave more than one response.

Table VIII: Vacation Destinations in the Next 2 Years

Q4. And what destinations do you have firm plans to visit during the next two years?

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
	969	176	271
None	27%	28%	21%
Europe	21	19	21
Mexico/Central South America	16	15	23
Other U.S. States	13	11	14
Other	19	12	11
Caribbean	7	10	5
Asia	7	7	8
Hawaii	6	3	6
Australia/New Zealand/ South Pacific	6	9	7
Vancouver	**5**	**4**	**5**
California	5	5	5
Pacific Northwest	4	6	4
Other Canada	3	3	4
Ontario	2	3	2
Other B.C.	**2**	**1**	**5**
Alaska	2	2	3
Victoria	**1**	**1**	**2**
Alberta	1	1	1

Mexico, Central and South America was the most popular response, when travellers who were extremely interested in outdoor adventure indicate where they plan to visit in the next two years. This was followed by Europe, at 21%. (Interestingly, Europe was the principal choice of travellers who rated outdoor adventure as a four.) Other U.S. states were the third most popular choice.

In terms of potential market for B.C., Vancouver was the choice for 5% of the travellers extremely interested in outdoor adventures. Other B.C. destinations and Victoria would be visited by about 7% of the respondents. The net number of people who said they will take at least one vacation to B.C. in the next two years is 9% of those interested in outdoor adventure vacations.

The next question deals with respondents' knowledge of B.C. as a vacation destination.

Table IX: Knowledge of B.C. as a Vacation Destination

Q44. How much do you know about B.C. as a vacation destination?

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	961	175	269
A great deal	11%	13%	13%
A moderate amount	32	31	32
A little	34	31	33
Nothing at all	23	25	22

The table shows that nearly half of those extremely interested in outdoor adventure knew a great deal or a moderate amount about B.C. as a vacation destination. A third of the travellers in this category knew a little about B.C., and a quarter knew nothing at all about B.C. as a vacation destination.

The number of travellers who have taken a vacation in B.C. is shown in the next table.

Table X: Number of Travellers Who Have Taken A Vacation In B.C.

Q45. How many times, if any, have you taken any kind of vacation in B.C. for one night or longer?

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	957	173	269
Vacationed in B.C. one night or longer	51%	50%	53%
None	49	50	47
Mean number of trips	3.3	2.8	4.8

More than half the travellers who were extremely interested in an outdoor adventure have been to B.C. for a vacation at least one night or longer, while 47% of those in the same category have never visited B.C.

The table also shows that most travellers who have been to B.C. have done so an average of over 3 times. Compared to this, travellers who were extremely interested in outdoor adventure have made an average of nearly 5 trips to B.C. The average frequency for this group is much higher than the average for the entire sample, suggesting that this group can be looked at as a market that would return to the province.

The level of interest in a B.C. vacation displayed by these travellers also needs to be examined in order to determine the percentage share B.C. commands as a potential holiday resort.

Table XI: Interest in A Vacation in B.C.

Q46. How interested are you in taking a vacation of any kind, lasting one night or longer, in British Columbia?

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	937	173	264
Not at all interested	10%	9%	6%
2	7	6	4
3	21	24	15
4	23	30	24
Extremely Interested	39	32	51

Half of the travellers who were extremely interested in outdoor adventure vacations stated that they would be extremely interested in visiting B.C. on a holiday. More travellers interested in outdoor adventure vacations said they would be extremely interested in visiting B.C. than the overall average of travellers in the total sample.

Only a small percentage (6%) of the respondents in the same category were not at all interested in B.C. as a destination.

E. SPECIFIC PRODUCT PREFERENCES

The travellers who were interested in this vacation were asked about the activities they would expect to participate in while on outdoor adventure vacations.

The first question in this section was asked to determine the amount of money respondents interested in outdoor adventure vacations were willing to spend on such a vacation.

Table XII: Average Cost Per Day For An Outdoor Adventure

Q10b. How much per day would you be willing to pay for an outdoor vacation?

	Number of Respondents	Mean Amount Per Day
Total Sample	216	$101
Seattle/ Portland	78	$ 79
San Francisco/ Los Angeles	83	$100
Dallas/ Chicago	55	$133

Respondents from Dallas and Chicago were willing to spend more than any of the other groups, on average, per day for outdoor adventure. On the other hand, people sampled in the Seattle and Portland area were willing to spend less.

Male respondents were willing to spend more than average on outdoor vacation, while the females indicated that they would spend substantially less.

On average, respondents indicated that they would be willing to travel nineteen hours to get to their vacation destinations. Interestingly, respondents in Seattle, Dallas and Portland stated they would be willing to travel the greatest length of time, averaging between 23 and 20 hours, while travellers from the other cities would travel a shorter time to get to their vacation destinations. Table XIII gives us the details of these findings.

Table XIII: Maximum Number of Hours Willing To Travel

	Interested in Outdoor Adventure Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	211	35	40	43	43	27	23
Mean number of hours	19	23	20	15	19	21	14

Most of the travelling in an outdoor vacation would be undertaken by car, as we can see in the next table.

Table XIV: Travel by Air or Car

	Interested in Outdoor Adventure Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	200	23	32	40	34	38	33
Air	40%	18%	28%	62%	41%	46%	41%
Car	54	58	69	36	54	54	59
Other	6	24	3	2	5	0	0

Except for travellers from San Francisco, the majority of the travellers would drive to their destinations. We see that two-thirds of the people from Portland show a higher than average preference for travelling by car. This is also true of travellers from Chicago and Seattle.

If this were their major vacation for the year, respondents stated that they would stay away from home an average of sixteen nights. People sampled in San Francisco and Seattle would be willing to stay away the longest, while travellers from the Dallas and Chicago indicated that on average, they would return home sooner.

Table XV: Average Number of Nights Away From Home

	Interested in Outdoor Adventure Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	246	41	44	51	45	35	30
Mean number of nights	16	18	16	20	14	12	12

Travellers were also asked to indicate the level of luxury they would expect on an outdoor adventure and this can be seen in Table XVI.

Table XVI: Degree of Luxury Wanted for this Vacation

	Interested in Outdoor Adventure Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	253	42	48	51	45	35	32
The most luxurious	2%	5%	0%	4%	2%	0%	3%
First Class	13	7	6	12	13	23	18
Middle Range	47	48	36	53	65	43	38
Basic Accommodation	34	36	52	29	16	34	38
Other/Depends	3	4	6	2	4	0	3

While on outdoor adventure vacations, most travellers indicated that middle range or basic accommodations would be sufficient for them. Two-thirds of the travellers from Los Angeles felt that middle range accommodations would be all they expected on this type of vacation, and this was much higher than the average.

Travellers from Portland showed a greater than average preference for basic accommodations, with 52% of them favouring this type of accommodations.

For respondents who were going on outdoor adventure vacations, the average size of the travelling party was three people.

In the next series of questions, respondents were asked to rate their level of interest in activities that might be a part of their outdoor adventure vacations.

Table XVII: Interest in Wildlife Viewing

Q28. How interested would you be in the following activities that you might do on an outdoor adventure: Wildlife Viewing.

		Interested in Wildlife Viewing	
	Total Sample	Four	Five
Number of Respondents	969	70	86
Seattle	17%	20%	15%
Portland	17	21	20
San Francisco	16	23	21
Los Angeles	16	16	14
Dallas	17	11	14
Chicago	17	9	16

We can see that out of the people who indicated they were extremely interested in outdoor adventure, the greatest interest in wildlife viewing came from the San Francisco and Portland sample, accounting for 21% and 20% respectively.

Chicago and Seattle were the two next largest groups within the extremely interested category with 16% and 15% (respectively) saying they were extremely interested in a wildlife viewing. Travellers from Los Angeles and Dallas, with only 14% from each city stating they were extremely interested in this activity, showed the least enthusiasm.

Wildlife viewing also seems to be more popular with the older travellers, as people over sixty-five showed a greater preference for this activity than people between the ages of twenty-five and thirty-four.

Table VIII: Interest in Coastal Cruising

Q29. How interested would you be in the following activities that you might do on an outdoor adventure: Coastal Cruising.

		Interested in Coastal Cruising	
	Total Sample	Four	Five
Number of Respondents	969	56	76
Seattle	17%	16%	13%
Portland	17	11	17
San Francisco	16	18	18
Los Angeles	16	16	17
Dallas	17	18	20
Chicago	17	21	15

For this activity, we need to keep in mind that only a small number of travellers indicated that they would be extremely interested in going coastal cruising. However, out of the travellers who were extremely interested in this activity, the largest percentage were from Dallas, with two out of ten people extremely interested.

Travellers from San Francisco, Portland and Los Angeles made up the next largest group of people who were extremely interested in this vacation. The smallest percentage of travellers who were extremely interested in coastal cruising came from Seattle and Chicago, accounting for 14% and 13% (respectively) of the sample.

Table XIX: Interest in Hiking

Q30. How interested would you be in the following activities that you might do on an outdoor adventure: Hiking.

		Interested in Hiking	
	Total Sample	Four	Five
Number of Respondents	969	63	106
Seattle	17%	22%	19%
Portland	17	19	23
San Francisco	16	24	20
Los Angeles	16	14	18
Dallas	17	8	9
Chicago	17	13	11

There were more travellers extremely interested in hiking than in any of the other activities presented to them for an outdoor adventure. The largest percentage of travellers who were extremely interested in hiking were from Portland, at 23%. Two out of ten travellers who were extremely interested in hiking came from San Francisco.

Travellers from Seattle and Los Angeles made up the next largest groups of people who were extremely interested in hiking. This was followed by travellers in Chicago with one out of ten travellers expressing extreme interest in hiking.

The smallest percentage of people who were extremely interested in this activity was from Dallas, at 9%.

Among the travellers interviewed about this activity, females showed a stronger preference for hiking. We might also note that the younger respondents were more likely to go hiking as fewer people over the age of 65 indicated an interest in hiking.

Table XX: Interest in Whitewater Canoeing

Q31. How interested would you be in the following activities that you might do on an outdoor adventure: Whitewater Canoeing.

		Interested in Whitewater Canoeing	
	Total Sample	Four	Five
Number of Respondents	969	35	79
Seattle	17%	21%	14%
Portland	17	11	19
San Francisco	16	32	17
Los Angeles	16	14	20
Dallas	17	11	15
Chicago	17	11	15

The largest percentage of travellers who were extremely interested in whitewater canoeing were from Los Angeles, accounting for 20%. Travellers from Portland were the second largest group of travellers extremely interested in whitewater canoeing.

The next group of travellers in order of size was San Francisco, with 17% of the travellers stating they were extremely interested. However, if we look at the number of travellers who gave this activity a rating of 4 or who said they were interested in this activity, the percentage of interested travellers almost doubles.

The travellers from Dallas and Chicago who said they were extremely interested in this activity each accounted for 15% of the sample. The smallest group of travellers extremely interested in this activity came from Seattle.

Younger travellers showed more interest in whitewater canoeing as close to half the people between the ages of twenty-five and thirty-four indicated an interest in this activity.

Table XXI: Interest in Rafting

Q32. How interested would you be in the following activities that you might do on an outdoor adventure: Rafting.

		Interested in Rafting	
	Total Sample	Four	Five
Number of Respondents	969	47	92
Seattle	17%	17%	15%
Portland	17	13	21
San Francisco	16	23	19
Los Angeles	16	23	19
Dallas	17	13	15
Chicago	17	11	11

After hiking, rafting had the second largest number of travellers who stated they were extremely interested in this activity. Two out of ten travellers who were extremely interested in rafting were from Portland. Together with San Francisco and Los Angeles, it accounted for almost six out of ten of the travellers who were extremely interested in rafting.

Seattle and Dallas each represented 15% of the travellers who were extremely interested in rafting. Chicago, with one in ten of the travellers claiming to be extremely interested in this activity, made up the smallest percentage of this sample, and was much lower than the average traveller.

Over half the younger population would be keen on river rafting while on vacation, but less than one-fifth of those over sixty-five displayed the same level of enthusiasm.

Table XXII: Interest in Fishing

Q33. How interested would you be in the following activities that you might do on an outdoor adventure: Fishing.

		Interested in Fishing	
	Total Sample	Four	Five
Number of Respondents	969	27	74
Seattle	17%	22%	19%
Portland	17	19	19
San Francisco	16	29	10
Los Angeles	16	7	19
Dallas	17	4	19
Chicago	17	19	14

The number of travellers who were extremely interested in fishing on an outdoor adventure made up one of the smallest groups in this section on vacation activities.

There was no difference in the percentages of travellers who were extremely interested in fishing while on an outdoor adventure in all the cities, with the exception of Chicago and San Francisco. These two cities accounted for the smallest percentage of extremely interested travellers for this activity.

While one out of ten travellers who were extremely interested came from San Francisco, it is interesting to note that three times as many travellers from that city rated this activity a 4 or were interested in it.

More men in the sample showed an interest in fishing, as close to half the men would go fishing on an outdoor adventure, while less than a third of the women would participate in this activity.

In Table XXIII we see the results of a question concerned having guided activities on outdoor adventure vacations.

Table XXIII: Vacation With Or Without Guided Activities

Q42B. Would you prefer a vacation with guided activities, or without a guide?

	Total Sample
Number of Respondents	251
Unguided	64%
Some of each/Depends	22
Guided	14
	100%

Unguided activities were preferred by the majority of respondents in all six cities.

In the next table we see the average level of interest expressed by the respondents for each of the activities discussed.

Table XXIV: Mean Levels of Interest in Specific Activities

	Interested in Outdoor Adventure Vacations
	Total Sample
Number of Respondents	255
Hiking	3.8
Wildlife Viewing	3.7
Coastal Cruising	3.5
River Rafting	3.5
Whitewater Canoeing	3.2
Fishing	3.1

These were the activities presented to the respondents. Although the differences between them are small, we see that hiking had more appeal to travellers interested in outdoor adventure, with a mean of 3.8 out of 5.0.

Wildlife viewing was the second most popular activity with a mean of 3.7. Coastal cruising and river rafting were third and fourth.

Whitewater canoeing and fishing were two activities that were not popular with as many travellers.

A final question in this section asked respondents if there were any other activities they would like to partake in while on a resort vacation. The results are shown in Table XXV.

Table XXV: Other Vacation Activities of Interest

Q42 Is there any other type of vacation activity in particular that would interest you more than any of the ones that I have just mentioned?

	Total Sample	Seattle	Portld.	S.F.	L.A.	Dallas	Chic.
Number of Respondents	154	29	28	30	24	25	18
Skiing/Cross Country Skiing	13%	36%	10%	3%	4%	16%	16%
Other Sports	12	14	17	13	13	8	6
Touring/ Sightseeing/ Exploring	11	10	17	3	17	8	16
Bicycling	10	7	7	24	8	4	6
Swimming/ Snorkling/ Scuba	8	0	11	18	0	8	10
Other	7	0	4	7	13	20	0
Horseback Riding	7	3	4	7	13	4	10
Other Water Sports	5	3	7	3	8	4	6
Hunting	5	15	0	3	8	0	0
Museums/ Gall. Cult.	4	3	4	7	0	4	6
Camping	3	0	7	3	0	4	0
Golf	3	0	4	0	0	8	6
Hist./Arch. Sites	3	3	0	0	4	8	0
Relax/Rest	2	0	0	0	8	0	6
Tennis	1	3	0	0	4	0	0
Visiting Fam/Friends	1	0	4	3	0	0	0

Family/Kids Activities	1	0	0	0	0	4	6
Meet People/ Learn Cult.	1	0	4	3	0	0	0
Beaches	1	0	0	3	0	0	0
Gambling	1	3	0	0	0	0	0
Religious Activities	1	0	0	0	0	0	0

A small number of respondents who were interested in outdoor adventure indicated that they would like to participate in more active individual sports. Activities like skiing, bicycling and swimming were among the more popular ones mentioned.

Respondents from Seattle showed more interest in skiing, but those interviewed in San Francisco showed a greater preference for cycling. The sample from Dallas and Chicago were far less interested in these activities.

When examining the table above, we need to keep in mind that the number of travellers who responded to this question was very small and therefore the findings need to be looked at in that perspective.

F. MEDIA FACTORS

The effectiveness of present advertising strategies was evaluated through a series of questions that pertained directly to particular slogans used in connection with B.C. The strength of the campaign for Canada as a whole was also surveyed. Questions were asked of travellers to help determine the advertising media that would be the most helpful in getting the message across to them.

Travellers who were interested in outdoor adventures were asked if they had heard the slogan ("Super, Natural") associated with a vacation destination, and these results are presented in Table XXVI.

Table XXVI: "Super, Natural" Associated with a Vacation Destination

Q43a. Have you ever heard the slogan "Super, Natural" associated with a vacation destination?

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	951	172	266
Yes	12%	12%	14%
Yes, If mentioned B.C.	8	12	8
No	80	76	78

The slogan "Super, Natural" was unfamiliar to eight out ten of the people surveyed in general, taking into consideration all vacation options. This slogan was known to 14% of the people who were extremely interested in an outdoor adventure plus another 8% who were able to associate this slogan with B.C. without any prompting.

Respondents who had not associated the slogan "Super, Natural" with B.C. were asked the next question.

Table XXVII: "Super, Natural" Associated with B.C.

Q43b. Have you heard the slogan ("Super, Natural") associated with British Columbia?

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	923	165	259
Yes	18%	18%	22%
No	74	70	69
Other	1	0	1
Yes, If mentioned B.C.	7	12	8

Presenting the respondents with both the name (British Columbia) and the slogan ("Super, Natural") increased the number of people who recalled the slogan in association with B.C. Twenty-two percent of the travellers in the extremely interested category now remembered the slogan, while an additional 8% remember it with reference to B.C.

However, seven out of ten travellers still had never heard of this slogan.

The advertising promoting Canada as a vacation destination was more effective as eight out of ten travellers in the highest rating category had heard or seen these promotions. Unfortunately, recall of B.C. advertising was lower.

Table XXVIII: Advertising for Canada as a Vacation Destination

Q51. Have you seen or heard any advertising for Canada as a vacation destination during the past year?

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	948	171	267
Yes	81%	84%	84%
No	19	16	16

Table XXIX: Advertising for B.C. as a Vacation Destination

Q52. Have you seen or heard any advertising for B.C. as a destination during the past year?

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	922	164	262
Yes	62%	63%	64%
No	38	37	36

Two-thirds of the travellers who expressed extreme interest in outdoor adventures had seen or heard some advertising promoting B.C. as a vacation destination in the last year. So although three-quarters of these travellers had previously said that they had no knowledge of the slogan "Super, Natural", a substantial number of them believe they had been exposed to the advertising.

The next series of questions all dealt with different means of getting information across to the travellers. The ratings are based on a 5 point scale, with 1 being not at all useful and 5 being extremely useful.

Table XXX: Brochures as a Source of Information

Q58. How useful do you find the following as a source of information when you are planning a vacation?: Brochures

	Total Sample	Interested in Outdoor Adventure Vacations	
		Four	Five
Number of Respondents	964	176	270
Not at all useful	8%	11%	9%
2	11	11	10
3	27	34	28
4	28	27	26
Extremely Useful	26	17	28

Brochures were a useful source of information to more than half of the travellers who rated outdoor adventure very highly and higher than average for all travellers. Approximately two out of ten of these travellers stated they had little or no use at all for the brochures.

Table XXXI: Usefulness of Radio and Television Advertising

Q59. How useful do you find the following as a source of information when you are planning a vacation?: Radio and television advertising.

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of	964	176	269
Not at all useful	27%	28%	29%
2	27	29	25
3	27	28	27
4	11	10	10
Extremely Useful	8	5	9

Radio and television advertising seems to be a less effective advertising tool than brochures. Only two out of ten people in the extremely interested category felt that this was a useful method of getting the information across, while more than half found it to be not useful.

Table XXXII: Usefulness of Newspaper and Magazine Articles

Q60. How useful do you find the following as a source of information when you are planning a vacation?: Newspaper and magazine articles and advertising.

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	962	175	268
Not at all useful	8%	6%	7%
2	11	18	10
3	28	23	31
4	29	37	30
Extremely Useful	24	17	22

Over half the travellers who were extremely interested in outdoor adventures felt that newspaper and magazine articles were useful in helping them to plan their vacations. Less than two-tenths of this same category felt that they had no or little use for this form of advertising.

Table XXXIII: Usefulness of Travel Agents or Tour Operators

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Travel agents or tour operators.

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	962	175	268
Not at all useful	15%	16%	18%
2	13	20	13
3	23	16	26
4	24	31	20
Extremely Useful	25	17	23

In the group of travellers who were extremely interested in outdoor adventures, one out of four people felt travel agents were extremely useful, while two out of ten felt they were not useful.

Table XXXIV: Usefulness of Friends and Relatives

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Friends or relatives.

		Interested in Outdoor Adventure Vacations	
	Total Sample	Four	Five
Number of Respondents	964	175	271
Not at all useful	10%	10%	9%
2	8	9	6
3	19	19	17
4	27	29	29
Extremely Useful	36	33	38

Friends and relatives appear to be one of the most useful sources of information when planning outdoor adventure vacations. This was a useful source of information to 67% of the respondents in the extremely interested rating, while only 15% found this source of little use.

The overall means for each medium as a useful source of information to people who are extremely interested in outdoor adventure are presented in the table below.

Table XXXV: Means For Each Medium as a Useful Source of Information

	Interested in Outdoor Adventure Vacations
	Total Sample
Number of Respondents	271
Friends & Relatives	3.8
Brochures	3.5
Newspapers & Magazines	3.5
Travel Agents & Tour Operators	3.2
Radio & Television	2.4

Travellers who were extremely interested in outdoor adventures found the information that they received from friends and relatives to be the most helpful, with a mean of 3.8 out of 5.0.

Brochures and newspapers and magazine articles were the second most useful source of information, with means of 3.5. The information received from travel agents and tour operators came in third with a rating of 3.2.

The least useful source of information to travellers extremely interested in outdoor adventure vacations was advertising seen or heard on radio and television, which only received a rating of 2.4.

G. MARKETING IMPLICATIONS

The potential market size for outdoor adventure vacations in B.C. is large, with some 514,000 prospective visitors, or 15 percent of all international travellers in these six U.S. metropolitan areas. San Francisco is the largest contributor to this total, primarily because of its larger population. On a percentage basis, travellers in Portland showed the greatest interest, but Portland is the smallest market surveyed. Chicago and Los Angeles are about tied for potential. Chicago and Dallas travellers are willing to pay a little more for outdoor adventures, but Portland and Seattle residents are below average in this respect.

The target market for B.C. outdoor adventure is clearly among younger travellers, especially those age 25 to 34. Males are somewhat more interested than females, although both sexes tend to participate in the household travel decisions. From the cluster analysis, we see that Affluent Urban Singles, Young Urban Ethnics and Young Professionals have the highest levels of interest in outdoor adventure. These people tend to live in San Francisco and Los Angeles. They do not know very much about B.C. as a vacation destination but are motivated to enjoy our scenic beauty.

Specific products which interest these travellers are varied, with hiking leading the list. Wildlife viewing, coastal cruising and river rafting are next. Whitewater canoeing and fishing appealed to somewhat fewer travellers. A small number volunteered skiing and bicycling as adventures they prefer, even though these activities were not questioned by name. The average length of these vacations was sixteen days, slightly longer among San Francisco residents and slightly shorter in Dallas and Chicago. Most travellers expect only basic accommodation on outdoor adventure vacations, except that Los Angeles and San Francisco travellers favour slightly better or "middle range" accommodation.

Advertising media, as described by the travellers interviewed, are best when they are informal. Friends and relatives, brochures, and articles in newspapers and magazines were preferred over the more intrusive media of radio and TV. Our experience in survey research is that consumers are frequently not able to correctly identify where they get their information on various categories of products and services, so caution is appropriate in using these findings.

The advertising message, in our opinion, should be to build awareness of B.C. as an ideal destination for outdoor adventure vacations. While 51 percent of the travellers with high interest in outdoor adventure say they are very interested in visiting B.C., 78 percent of them cannot associate the "Super, Natural" slogan with this province. The half of this group who have already visited B.C. have done so an average of 5 times (which is high among travellers in general), but the other half contains too many people who say they know nothing at all about B.C. We believe that creating awareness of the B.C. setting for outdoor adventures of many kinds should be a top priority for future advertising and promotion.

APPENDIX

CLUS. ER 7

Affluent Urban Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	37.6	19.9	189
White Collar	74.7	53.4	140
Blue Collar	15.2	30.9	49
Unskilled	2.1	5.0	42
HOUSEHOLD COMPOSITION			
Female Householder	33.9	24.3	140
Black Householder	7.4	10.5	70
Spanish Householder	4.6	4.7	98
Asian Householder	4.0	1.0	400
Householder Age 65+	17.1	21.4	80
Married Couples	41.1	58.5	70
Households w/ Children	22.4	41.0	55
Two Workers	57.7	52.8	109
SESI	77	48	160
INCOME			
Income 0 to 25K	13.9	39.4	35
Income 25K+ to 50K	68.4	45.0	152
Income 50K+ to 75K	15.3	12.5	122
Income 75K+	2.4	3.1	77
Median HH Income	$29,715	$24,533	122
HOUSING			
Single Family Homes	44.6	81.2	55
Multi-Family Homes	55.4	18.8	295

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	28.5	35.0	81
Some College	20.8	14.6	142
College Graduate	33.0	14.1	234
Median # Years Comp.	13.8	12.2	113
AGE DISTRIBUTION			
Age 0-5 Years	2.9	4.1	71
Age 0-17 Years	8.9	15.5	57
Age 18-34 Years	20.9	27.4	76
Age 35-54 Years	9.2	13.0	71
Age 55-64 Years	6.4	8.8	73
Age 65+ Years	8.0	11.2	71
Median Age in Years	39.6	40.0	99
LENGTH OF RESIDENCE (In Years)	5.3	8.0	66

1988 U.S. HOUSING POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,970,383	90,328,747	3.3
Adult Population	5,232,446	181,649,997	2.9

CLUSTE.. 7

PRODUCT PREFERENCES

FINANCIAL SERVICES

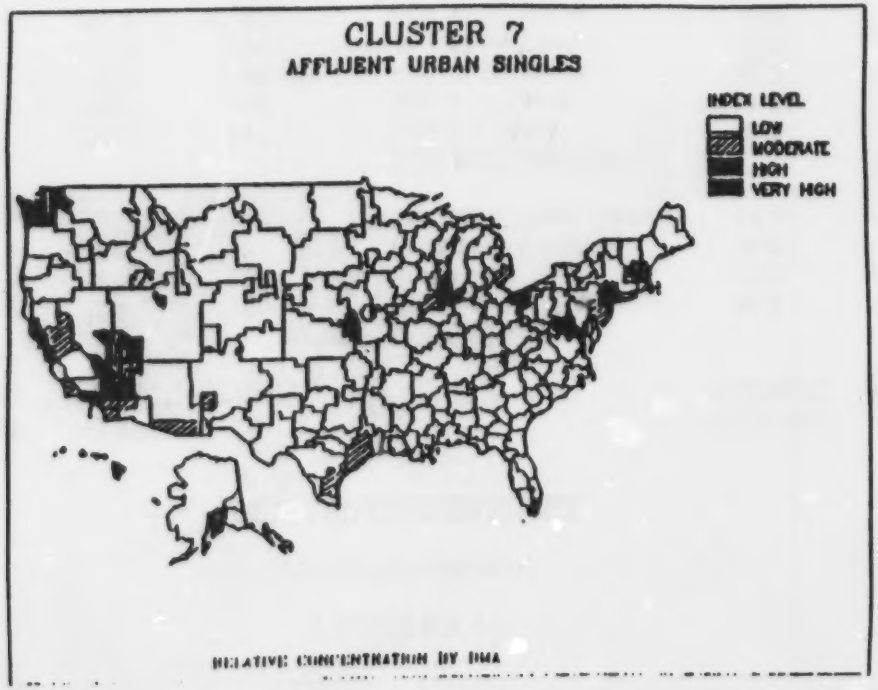
American Express Gold Card
Investment Property
Travel/Entertainment Cards
Brokerage Accounts
Insured Money Market Accounts
Temporary Insurance
Mutual Fund
Common Stock
IRA
Interest Bearing Checking Accounts

LEISURE PURSUITS

Domestic Travel
Snow Skiing
Attend Horse Races
Foreign Travel
Photography
Golf
Camping
Live Theatre/Concerts
Attend Pro Sports Events
Frequently Attend Movies

SPENDING HABITS

Gourmet Ice Cream
Discount Airlines
Imported Beers
Imported Whiskey
Frozen Yogurt
Lowfat Milk
Diet Soft Drinks
Imported Cars
Bottled Water
Imported White Wines



CLUSTER 10

Young Professionals

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	36.8	19.9	185
White Collar	69.2	53.4	130
Blue Collar	17.6	30.9	57
Unskilled	2.4	5.0	48
HOUSEHOLD COMPOSITION			
Female Householder	30.9	24.3	127
Black Householder	4.5	10.5	43
Spanish Householder	2.9	4.7	62
Asian Householder	1.9	1.0	190
Householder Age 65+	17.5	21.4	82
Married Couples	46.4	58.5	79
Households w/ Children	27.0	41.0	66
Two Workers	59.9	52.8	113
SESI	72	48	150
INCOME			
Income 0 to 25K	22.3	39.4	57
Income 25 to 50K	64.7	45.0	144
Income 50 to 75K	11.6	12.5	93
Income 75K+	1.4	3.1	45
Median HH Income	$26,950	$24,533	110
HOUSING			
Single Family Homes	70.7	81.2	87
Multi-Family Homes	29.3	18.8	156

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	24.8	35.0	71
Some College	21.9	14.6	150
College Graduate	36.6	14.1	260
Median # Years Comp.	14.1	12.2	116
AGE DISTRIBUTION			
Age 0-5 Years	3.7	4.1	90
Age 0-17 Years	11.5	15.5	74
Age 18-34 Years	25.3	27.4	92
Age 35-54 Years	12.0	13.0	92
Age 55-64 Years	6.7	8.8	76
Age 65+ Years	9.2	11.2	82
Median Age in Years	35.5	40.0	89
LENGTH OF RESIDENCE (in Years)	4.9	8.0	61

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	1,375,287	90,328,747	1.5
Adult Population	2,590,603	181,649,997	1.4

CLUSTER 10

PRODUCT PREFERENCES

FINANCIAL SERVICES

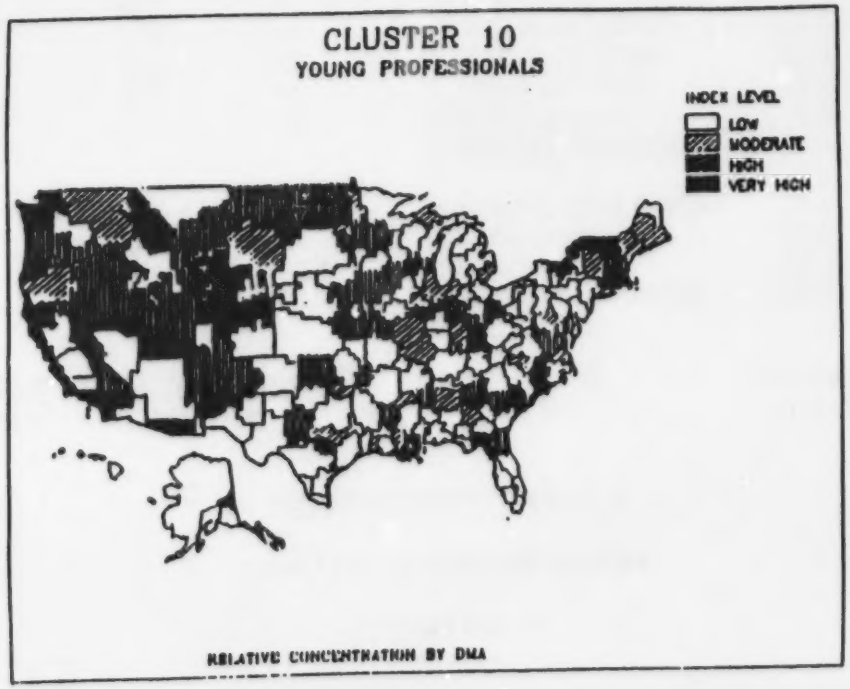
Mutual Funds
Second Mortgage/Home Equity Loans
Auto Loan - New Car
American Express Gold Card
Insured Money Market Account
Prepaid Health Program
Temporary Insurance
Home Improvement Loans
Long Term Savings Certificate
Accounting Services

LEISURE PURSUITS

Snow Skiing
Camping
Jogging
Golf
Live Theatre/Concerts
Bicycling
Domestic Travel
Public Issue Involvement
Frequently Attend Movies
Tennis

SPENDING HABITS

Imported Beers
Gourmet Foods
Diet Soft Drinks
Frozen Yogurts
Upscale Cosmetics
Paperback Books
Jewelry
Imported Cars
Bottled Water
Domestic White Wine



CLUSTER 12

Highly Mobile Working Couples

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	26.3	19.9	132
White Collar	63.2	53.4	118
Blue Collar	24.2	30.9	78
Unskilled	3.2	5.0	64
HOUSEHOLD COMPOSITION			
Female Householder	17.7	24.3	73
Black Householder	5.0	10.5	47
Spanish Householder	4.0	4.7	85
Asian Householder	2.0	1.0	200
Householder Age 65+	6.5	21.4	30
Married Couples	65.5	58.5	112
Households w/ Children	49.4	41.0	120
Two Workers	62.1	52.8	118
SESI	68	48	142
INCOME			
Income 0 to 25K	14.2	39.4	36
Income 25K+ to 50K	67.1	45.0	149
Income 50K+ to 75K	16.9	12.5	135
Income 75K+	1.8	3.1	58
Median HH Income	$29,920	$24,533	122
HOUSING			
Single Family Homes	78.7	81.2	97
Multi-Family Homes	21.3	18.8	113

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	35.3	35.0	101
Some College	23.0	14.6	158
College Graduate	22.5	14.1	160
Median # Years Comp.	12.9	12.2	106
AGE DISTRIBUTION			
Age 0 to 5 Years	6.2	4.1	151
Age 0 to 17 Years	19.2	15.5	124
Age 18 to 34 Years	35.9	27.4	131
Age 35 to 54 Years	17.2	13.0	132
Age 55 to 64 Years	6.6	8.8	75
Age 65+ Years	6.1	11.2	54
Median Age in Years	32.7	40.0	82
LENGTH OF RESIDENCE (In Years)	4.1	8.0	51

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	3,471,871	90,328,747	3.8
Adult Population	6,936,753	181,649,997	3.8

CLUSTER 12

PRODUCT PREFERENCES

FINANCIAL SERVICES

Common Stock
Investment Property
Line of Credit Account
Auto Loan - New Car
Higher Value Life Insurance
Travel/Entertainment Cards
Frequent Stock Transactions
Disability Insurance
Personal Loan (s) - Not for Education
Department Store Credit Cards

LEISURE PURSUITS

Racquet Ball
Golf
Domestic Travel
Tennis
Snow Skiing
Attend Pro Sports Events
Camping
Bicycling
Bowling
Public Issue Involvement

SPENDING HABITS

Imported Beers
Wine Coolers
Mexican Food Ingredients
Soft Drinks (Diet/Regular)
Imported Cars
Imported Wines
Jewelry
Clothing Expenditures
Merchandise by Mail/Phone

C. JSTER 17

Young Urban Educated Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	33.5	19.9	168
White Collar	71.7	53.4	134
Blue Collar	15.4	30.9	50
Unskilled	2.3	5.0	46
HOUSEHOLD COMPOSITION			
Female Householder	33.0	24.3	136
Black Householder	5.7	10.5	54
Spanish Householder	3.7	4.7	79
Asian Householder	2.8	1.0	280
Householder Age 65+	8.5	21.4	40
Married Couples	29.3	58.5	50
Households w/ Children	17.1	41.0	42
Two Workers	59.8	52.8	113
SESI	68	48	142
INCOME			
Income 0 to 25K	41.5	39.4	105
Income 25K+ to 50K	51.9	45.0	115
Income 50K+ to 75K	5.9	12.5	47
Income 75K+	0.7	3.1	23
Median HH Income	$21,912	$24,533	89
HOUSING			
Single Family Homes	43.9	81.2	54
Multi-Family Homes	56.1	18.8	298

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	21.6	35.0	62
Some College	22.3	14.6	153
College Graduate	39.7	14.1	282
Median # Years Comp.	14.0	12.2	115
AGE DISTRIBUTION			
Age 0 to 5 Years	2.4	4.1	59
Age 0 to 17 Years	6.3	15.5	41
Age 18 to 34 Years	23.4	27.4	85
Age 35 to 54 Years	9.2	13.0	71
Age 55 to 64 Years	3.9	8.8	44
Age 65+ Years	4.6	11.2	41
Median Age in Years	27.9	40.0	70
LENGTH OF RESIDENCE (In Years)	2.5	8.0	31

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	2,312,714	90,328,747	2.6
Adult Population	4,014,659	181,649,997	2.2

CLUSTER 17

PRODUCT PREFERENCES

FINANCIAL SERVICES

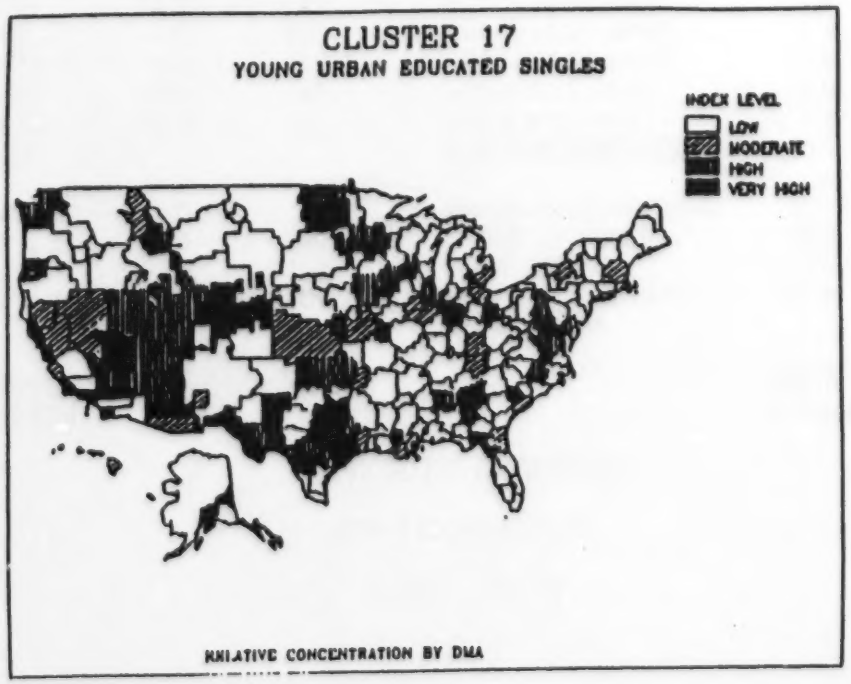
American Express Gold Card
Travelers Cheques
Visa Card
American Express Green Card
Temporary Insurance
Prepaid Health Program
Mutual Fund
Line of Credit Account
Non-Interest Bearing Checking Account

LEISURE PURSUITS

Snow Skiing
Water Skiing
Tennis
Racquet Ball
Frequent Foreign Travel
Jogging
Attend Movies Frequently
Live Theatre/Concerts
Prescribed Physical Fitness Programs
Camping
Bicycling

SPENDING HABITS

Imported Beers
Gourmet Ice Cream
Wine Coolers
Frozen Yogurt
Canned Soups - Single Serving
Diet Soft Drinks
Sports Equipment
Imported Cars
Clothing Expenditures



CLUSTER 24

Young Urban Ethnics

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	20.7	19.9	104
White Collar	56.1	53.4	105
Blue Collar	26.4	30.9	85
Unskilled	4.3	5.0	86
HOUSEHOLD COMPOSITION			
Female Householder	35.7	24.3	147
Black Householder	9.3	10.5	89
Spanish Householder	8.2	4.7	174
Asian Householder	3.8	1.0	380
Householder Age 65+	16.0	21.4	75
Married Couples	33.3	58.5	57
Households w/ Children	24.8	41.0	60
Two Workers	51.0	52.8	97
SESI	48	48	100
INCOME			
Income 0 to 25K	71.4	39.4	181
Income 25K+ to 50K	26.5	45.0	59
Income 50K+ to 75K	2.0	12.5	16
Income 75K+	0.1	3.1	3
Median HH Income	$17,328	$24,533	71
HOUSING			
Single Family Homes	43.6	81.2	54
Multi-Family Homes	56.4	18.8	300

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	31.9	35.0	91
Some College	19.5	14.6	133
College Graduate	16.8	14.1	119
Median # Years Comp.	12.3	12.2	101
AGE DISTRIBUTION			
Age 0 to 5 Years	2.9	4.1	70
Age 0 to 17 Years	8.0	15.5	52
Age 18 to 34 Years	20.6	27.4	75
Age 35 to 54 Years	8.4	13.0	65
Age 55 to 64 Years	4.6	8.8	52
Age 65+ Years	7.0	11.2	63
Median Age in Years	32.8	40.0	82
LENGTH OF RESIDENCE (In Years)	3.3	8.0	41

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,768,664	90,328,747	3.1
Adult Population	4,760,922	181,649,997	2.6

CLUSTER 24

PRODUCT PREFERENCES

FINANCIAL SERVICES

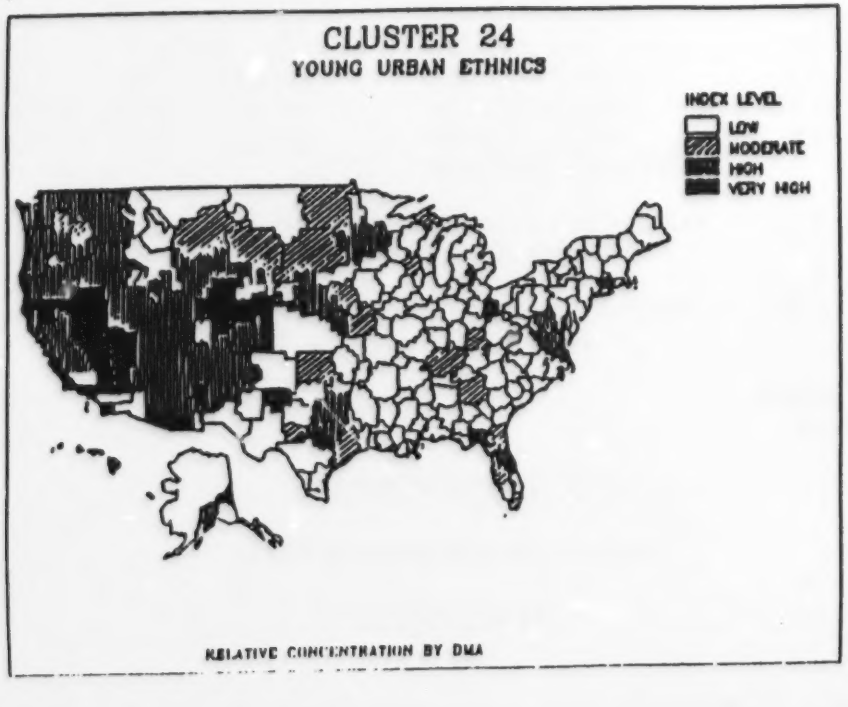
American Express Green Card
Temporary Insurance
Prepaid Health Program
Money Orders
Vision Care Insurance
Travelers Cheques

LEISURE PURSUITS

Snow Skiing
Attend Pro Sports Events
Travel to Mexico
Camping
Jogging
Attend Movies
Water Skiing
Racquet Ball
Bowling
Live Theatre/Concerts

SPENDING HABITS

Gourmet Ice Cream
Imported Beers
Health & Beauty Aids
Stereo Equipment
Records/Tapes
Frozen Yogurt
Wine Coolers
Gourmet Food Items



CLUSTER 25

Young Mobile Apartment Dwellers

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	17.6	19.9	88
White Collar	49.2	53.4	92
Blue Collar	33.5	30.9	108
Unskilled	5.0	5.0	100
HOUSEHOLD COMPOSITION			
Female Householder	29.2	24.3	120
Black Householder	4.4	10.5	42
Spanish Householder	3.7	4.7	79
Asian Householder	1.0	1.0	100
Householder Age 65+	20.4	21.4	95
Married Couples	50.4	58.5	86
Households w/ Children	32.3	41.0	79
Two Workers	52.7	52.8	100
SESI	45	48	94
INCOME			
Income 0 to 25K	58.7	39.4	149
Income 25K+ to 50K	37.5	45.0	83
Income 50K+ to 75K	3.6	12.5	29
Income 75K+	0.2	3.1	6
Median HH Income	$20,411	$24,533	83
HOUSING			
Single Family Homes	21.5	81.2	26
Multi-Family Homes	78.5	18.8	418

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	36.0	35.0	102
Some College	16.2	14.6	111
College Graduate	11.7	14.1	83
Median # Years Comp.	12.0	12.2	98
AGE DISTRIBUTION			
Age 0 to 5 Years	4.5	4.1	110
Age 0 to 17 Years	14.9	15.5	96
Age 18 to 34 Years	27.9	27.4	102
Age 35 to 54 Years	12.5	13.0	96
Age 55 to 64 Years	8.5	8.8	97
Age 65+ Years	12.9	11.2	115
Median Age in Years	37.0	40.0	93
LENGTH OF RESIDENCE (In Years)	6.1	8.0	76

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,494,365	90,328,747	2.8
Adult Population	4,643,898	181,649,997	2.6

CLUSTER

PRODUCT PREFERENCES

FINANCIAL SERVICES

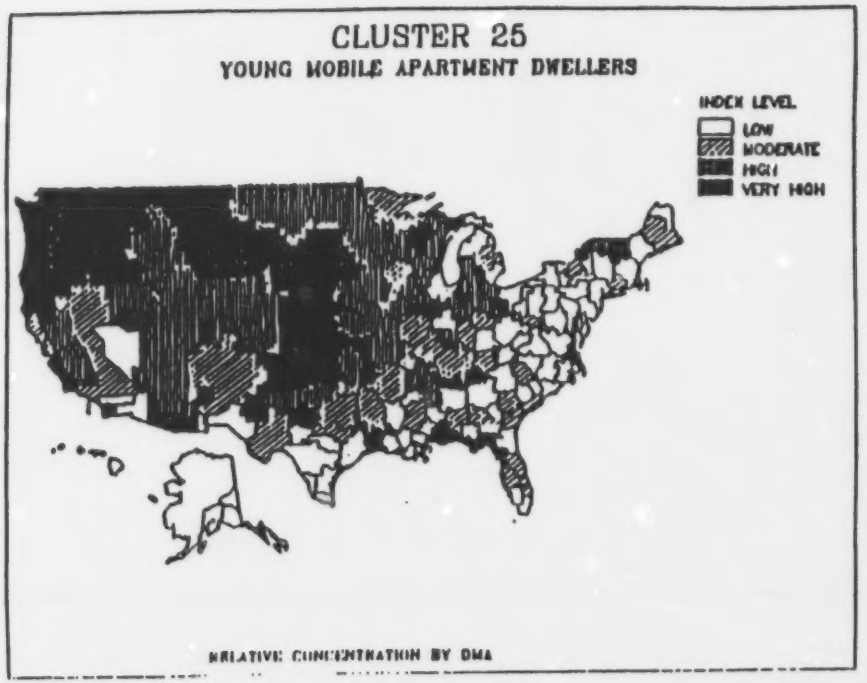
Medical/Healthcare Insurance - Medicare
Money Orders
Non-Interest Bearing Checking Accounts
Home Improvement Loans
Legal Services

LEISURE PURSUITS

Camping
Snow Skiing
Belong to Fraternal Order
Water Skiing
Fishing
Hunting
Public Issue Involvement

SPENDING HABITS

Health & Beauty Aids
Non Filter Cigarettes
Weight Watchers Products
Soft Drinks
Domestic Beers
Snack Candy
Clothing Expenditures
Imported Trucks



QUESTIONNAIRE

Campbell Goodell Consultants

TOURISM - MARKET MATCH STUDY - #448

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY QUESTIONNAIRE

Hello, this is _____, calling from Gilmore Research, a national survey research company. We are conducting a survey (today/this evening) and your household has been selected.

We are interviewing people who have travelled outside the United States during the past three years or who plan to do so in the next two years. Is there anyone like that living in your household, who is also 25 years old or older?

NOTE: TRAVEL FOR BUSINESS OR PLEASURE IS ACCEPTABLE

IF NO, RECORD AND TERMINATE

IF YES, CONTINUE

Is there more than one person like that living in your household?

IF NO, ASK TO SPEAK TO THE PERSON WHO HAS OR IS PLANNING TO TRAVEL OUTSIDE THE US
CONTINUE AT "A"

IF YES, SAY:

Of those who have travelled outside the United States, I need to speak to [RANDOM: oldest/youngest] May I please speak to that person?

IF YES, CONTINUE AT "A"

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

A. REINTRODUCE IF SELECTED R IS NOT PERSON WHO ANSWERED THE PHONE

My questions will take 10 or 12 minutes, May I go ahead? Thank you.

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

PERSUADERS

We are not selling anything at all.

The topic of the interview is international travel; what you like to do and where you like to go.

It is very important that we speak to you. Your opinions represent many others and if we cannot interview every member of our sample, the accuracy of our data will be reduced.

This is a very important study, because it will be used to plan tourist activities.

I can't tell you who the sponsor of the study is right now, because it might influence the way you answer some questions. But I would be happy to tell you at the end of the interview.

Everything you say will be kept strictly confidential.

Q1. Have you taken a trip outside the United States, either for business or pleasure, during the past three years, or are you planning such a trip during the next two years?

1. YES | SKIP TO Q3

2. NO
3. DON'T KNOW
4. REFUSED

Q2. ASK IF Q1 EQ 2, 3 OR 4. Is there anyone else in your household, who is 25 or older, who has travelled outside the US during the past three years or is planning to do so during the next three years?

1. YES - ASK TO SPEAK TO THAT PERSON AND X-BACK TO A.

2. NO | SAY: I only need to talk to people
3. DON'T KNOW | who have or are planning to travel
4. REFUSED | outside the US, so those will be
| all my questions. Thank you for
| your time. TERMINATE AND X-BACK

Q3. Thinking of your major vacation travel to any location, what vacation destinations have you traveled to in the last three years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4. And what destinations do you have <u>firm</u> plans to visit during the next two years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4B. Have your travel plans changed in response to the war in the Persion Gulf?

1. YES
2. NO
3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q4C. ASK IF Q4B EQ 1. How have your travel plans changed?

1. POSTPONED/CANCELLED TRIP TO MIDEAST
2. POSTPONED/CANCELLED TRIP TO EUROPE
3. POSTPONED/CANCELLED OTHER TRIP OUTSIDE THE US/WILL TRAVEL ONLY IN THE US
4. POSTPONED/CANCELLED AIR TRAVEL/WILL NOT TRAVEL BY AIR
5. OTHER (SPECIFY - ONE FRAME)
6. DON'T KNOW
7. REFUSED

Next, I'd like you to think about a vacation you might take outside your home state. I'm going to read four general types of vacation you might take. Please rate each one on a scale of 1 to 5, where 1 means you would not be interested at all in that type of vacation, and 5 means you would be extremely interested.

First is:

RANDOM

Q5. A city trip, where you could shop, visit museums, enjoy entertainment, dine, attend plays or concerts or just stroll and enjoy the city. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q6. An outdoor adventure vacation in a natural area, where you could engage in activities such as camping, hunting, fishing, hiking or rafting. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q7. A resort vacation to a resort or a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis, horseback riding and so on, were available close by or on the premises. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NOT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q8. A touring vacation by car, bus, RV or train through areas of scenic beauty, cultural or general interest. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

*** DISPLAY SCREEN OF RESPONSES TO Q5-8.
*** INTERVIEWER: SELECT VACATION TYPE WHICH IS HIGHEST RATED, GIVEN QUOTAS

Next, I'd like to ask you some questions about a [RECOVER FROM DISPLAY SCREEN THE TYPE OF VACATION R FINDS MOST INTERESTING]. Remember that this is a vacation that you would take outside your home state.

Q10. How much per day would you be willing to pay for a [RECOVER VACATION TYPE FROM DISPLAY SCREEN], per person, excluding transportation costs?
FOR TOURING VACATION, DELETE "excluding transportation costs"

_____ DOLLARS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just take a guess?)
9999. REFUSED

Q11. Assuming that this vacation took outside the your home state, what is the maximum hours you would be willing to travel get to your destination?

____ HOURS (IF RANGE GIVEN, ENTER THE AVERAGE)

9996. NONE
9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q11B. ASK IF Q11 NE 9996, 9997, 9998,9999. Does this refer to travel by air or by car?

1. AIR
2. CAR
3. OTHER
4. DON'T KNOW
5. REFUSED

Q12. What would be the best length of vacation, in terms of number of nights away from home? Assume that this is your major vacation during the year.

____ NIGHTS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q13. What degree of luxury would you want for this vacation:

1. The most luxurious,
2. First class,
3. Middle range, or
4. Basic accommodation?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q14. If this were your major vacation during the year, how many people would there be in your travelling party, including yourself?

____ NUMBER (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just make an estimate?
9999. REFUSED

Next, I'm going to read a list of activities that you might do on a [RECOVER TYPE OF VACATION FROM DISPLAY FRAME]. Using the scale from 1 to 5, please tell me how interested you would be in each one.

(Remember that 1 means that you are not at all interested and 5 means that you are extremely interested.)

*** FOR CITY VACATIONS

RANDOM

Q15. Shopping (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q16. Sightseeing (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q17. Visiting heritage or historic sites. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q18. Cultural activities, like museums, theatre or opera. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q19. Special events or shows. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q20. Visiting gardens. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q21. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR TOURING VACATIONS

RANDOM

Q22. Guided or organized tours. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q23. Tours which stay mainly in cities. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q24. Tours which stay mainly in rural areas. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q25. Tours involving sports activities, like golf, tennis or fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q26. Tours involving outdoor activities, like hiking or nature walks. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q27. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR RESORT VACATIONS

RANDOM

Q28. Marine resorts (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q29. Fishing resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q30. Ski resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q31. Golf resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q32. Guest or dude ranches ranches. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q33. Health resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q34. Wilderness resorts which are not acccessible by automobile. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q35. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR OUTDOOR VACATIONS

RANDOM

Q36. Wildlife viewing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q37. Coastal cruising or boating. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q38. Hiking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q39. Whitewater canoeing or kayaking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q40. River rafting. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q41. Fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q42. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

Q42B. Would you prefer a vacation with guided activities, or without a guide?

1. GUIDED
2. SOME OF EACH/DEPENDS
3. UNGUIDED

4. OTHER
5. DON'T KNOW
6. REFUSED

Q43. Next, thinking of the [RECOVER VACATION TYPE FROM DISPLAY FRAME OR IF NO VACATION TYPE IS PREFERRED, SAY: your next major vacation], what are the three most attractive destinations that come to mind which are outside your home state?

ONE FRAME

Q43A. Have you ever heard the slogan "Super Natural" associated with a vacation destination?

1. YES
2. YES WITH MENTION OF BRITISH COLUMBIA
3. NO
4. OTHER
5. DON'T KNOW/NOT SURE/DON'T REMEMBER
6. REFUSED

Q43B. ASK IF Q43A EQ 1, 3-6. Have your ever heard this slogan (Super Natural) associated with British Columbia?

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q44. How much do you know about British Columbia as a destination for <u>any type</u> of vacation?

READ

1. A great deal,
2. A moderate amount,
3. A little, or
4. Nothing at all?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q45. How many times, if any, have you taken <u>any kind</u> of vacation in <u>British Columbia</u> for one night or longer?

____ NUMBER OF TIMES

9998. DON'T KNOW (ASK: What would be the approximate number of times?)

9999. REFUSED

Q46. On the scale of 1 to 5 (where 1 means not at all interested and 5 means extremely interested), how interested are you in taking a vacation <u>of any kind</u>, lasting one night or longer, in British Columbia?

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW | SKIP
7. REFUSED | TO Q48

Q47. ASK IF Q 46 EQ 1-5. Why did you rate your interest in a British Columbia vacation at a [RECOVER SCORE FROM Q47]? PROBE AND CLARIFY

THREE FRAMES

Q47B. Has Canada become a more attractive destination to you, in the light of the war in the Persian Gulf, or not?

1. HAS BECOME MORE ATTRACTIVE
2. HAS NOT BECOME MORE ATTRACTIVE

3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q47C. ASK IF Q47B EQ 1 OR 2. What are your major reasons for saying that?

THREE FRAMES

Now for a different type of question. During the past year, please tell me if you have seen or heard any advertising for each of the following places as a vacation destination.

RANDOM

Q48. Hawaii. (Have you seen or heard any advertising for Hawaii as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q49. Australia. (Have you seen or heard any advertising for Australia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q50. Alaska. (Have you seen or heard any advertising for Alaska as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q51. Canada. (Have you seen or heard any advertising for Canada as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q52. British Columbia. (Have you seen or heard any advertising for British Columbia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q53. Alberta. (Have you seen or heard any advertising for Alberta as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q54. Ontario. (Have you seen or heard any advertising for Ontario as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q55. Colorado. (Have you seen or heard any advertising for Colorado as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

END RANDOM

On a scale of 1 to 5, how useful do you find each of the following as a source of information when you are planning a vacation, where 1 means not at all useful and 5 means extremely useful?

RANDOM

Q58. Brochures.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q59. Radio and television advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q60. Newspaper and magazine articles and advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q62. Travel agents or tour operators.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q63. Friends or relatives.
(How useful do you find this source of information , on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

END RANDOM

Q64. Finally, just a few questions about yourself to help us classify our data. First, who makes the major travel decisions in your household:

1. The male head of household,
2. The female head of household,
3. Both together, or
4. Someone else?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q65. Into which age category may I place you?

1. Under 25,
2. 25 to 34,
3. 35 to 44,
4. 45 to 54,
5. 55 to 64, or
6. 65 and over.

Q66. What is your full nine-digit zip code?

IF R DOES NOT KNOW ALL NINE DIGITS, CODE FIRST FIVE DIGITS TO THE LEFT OF THE DASH.

_ _ _ _ _ - _ _ _ _ ENTER CODE

99998. DON'T KNOW
99999. REFUSED

Q67. ASK ONLY IF R DID NOT SUPPLY FULL NINE-DIGIT ZIP CODE: And what is your street address?

ONE FRAME

NOTE: PLEASE BE CAREFUL. SPELLING IS EXTREMELY IMPORTANT. ALSO, BE SURE TO RECORD THINGS LIKE "WEST" OR "NE" AND TO GET A HOUSE NUMBER, ROUNDED TO THE NEAREST HUNDRED IF NECESSARY. DO NOT ACCEPT INTERSECTIONS UNLESS YOU CANNOT GET A HOUSE NUMBER

Q68. So that my supervisor can verify my work, may I have your first name or initial?

ONE FRAME

Those are all my questions. Thank you very much for your time.

Q69. RECORD GENDER

1. MALE
2. FEMALE

Q70. RECORD LENGTH OF INTERVIEW

Q71. RECORD CITY

1. SEATTLE
2. PORTLAND
3. SAN FRANCISCO
4. LOS ANGELES
5. DALLAS
6. CHICAGO

Q72. RECORD DATE

Q73. RECORD PHONE NUMBER

Q74. INTERVIEWER ID